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INSIGHTS ON...

Vol. 2, No. 3

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INSIGHTS ON...

In This Issue...

A Profile of Small Business Across Canada

Respondents

Short Term Expectations Survey

A picture of what is the Short Term Expectations Survey

New

Information coming from different divisions

November 1998

Aussi disponible en français



Statistics Canada Statistique Canada

A PROFILE OF SMALL BUSINESS ACROSS CANADA

by Luke Pelot

Small Business is Big

The vast majority of Canadian business enterprises are small and as a group, though small, they make a significant contribution to the Canadian economy. There were over a million small businesses with gross revenues of between \$25 thousand and \$5 million in 1995¹ and their combined gross revenue was over \$300 billion. They are also a major source of employment, providing one out of every six jobs in Canada - a total of nearly 2.5 million. This article profiles these businesses and highlights their diversity.

Statistics Canada's Small Business Profiles

This article is based on the *Small Business Profiles*² data set. Each profile provides detailed information for an "average" small business, including:

- revenue, expenses and profit;
- employment;
- assets, liabilities and equity;
- and, financial ratios.

Profiles are available by type of business (unincorporated, incorporated, and both combined) for about 680 different industries in Canada³. They are also produced for each province and territory, but with reduced industry detail. This article focuses on revenue, profit, assets and equity.

An Entrepreneurial Map of Canada

In 1995, there were 361 small businesses for every 10,000 people in Canada. The Atlantic provinces along with the Northwest Territories have the lowest ratios of small business to population. At the other end of the scale, the Yukon Territory is the most "entrepreneurial" with 533 businesses per 10,000 people, followed closely by two western provinces, Alberta and British Columbia. The actual reasons for these variations aren't clear, but further clues can probably be found by looking at the industry mix in detail.

¹ There are many more businesses with annual revenue less than \$25,000. The Labour Force Survey reported a total of 2.1 million self-employed individuals in 1995.

² The source for the *Small Business Profiles* is a sample of tax returns submitted to Revenue Canada by both unincorporated (T1 returns) and incorporated (T2 returns) businesses. For 1995 the sample included 193,000 tax returns. A consortium of federal and provincial government departments provides funding for the *Profiles*.

³ The industries are defined according to a standard definition for industries, which is produced by Statistics Canada. More information on this classification system is available from the publication "Standard Industrial Classification, 1980".

Canada

There are also notable differences between the number of larger and small businesses in a given industry, as **Table 2** shows. To some extent this is like comparing apples and oranges, since certain industries are very broadly defined. Still, some industries tend to have a greater proportion of small businesses than large businesses. Business services, other services, construction and real estate show a greater proportion of small businesses than large. On the other hand, companies with revenues greater than \$5 million a year dominate manufacturing and wholesale, which may indicate that economies of scale are especially important in these industries.

Revenue

Average revenue for small businesses in most provinces is close to the national average of \$285,000. **Chart 1** ranks the provinces and territories by average revenue.

Broadly speaking, average revenues for small business are in line with the size of their provincial economy. For example in the smaller economies such as the Territories and PEI, average revenues are the lowest at around \$150,000 to \$200,000. In the larger provinces, revenue is higher, for example in Quebec, Ontario and Manitoba small businesses revenues average around \$300,000.

Table 1: Distribution of Small Business by Province or Territory

	Small Businesses per 10,000 population	Total Small Businesses
Yukon	533	1,700
Alberta	480	133,500
British Columbia	466	180,900
Ontario	347	385,200
Quebec	334	243,000
Manitoba	302	34,200
Saskatchewan	300	30,600
New Brunswick	288	21,700
Nova Scotia	262	24,400
Northwest Territories	242	1,600
Prince Edward Island	237	3,300
Newfoundland	187	10,600
Canada	361	1,070,000

Business owners tend to opt for incorporation when their business grow larger. As one would expect, average revenues are lower for unincorporated (at close to \$100,000) than for incorporated businesses (at over \$400,000).

The difference in average revenues between incorporated and unincorporated small business is modest in some provinces while for others it is more marked. For example, Ontario has the highest average revenues for incorporated small businesses and one of the lowest average revenues for

unincorporated businesses. In contrast, the Yukon, PEI and Newfoundland have higher average revenues for unincorporated businesses and low average revenues for incorporated businesses.

While the size of the provincial economy appears to be an important factor determining provincial average revenues, differences in the mix of industries is also important. There are much larger differences in average revenues between industries than between provinces and territories.

The lowest average revenue was in Other Services Industries at \$164,000. Manufacturing was at the other end of the spectrum, with \$623,600.⁶ **Chart 2** shows average revenue for all businesses (incorporated and unincorporated) by industry.

On the other hand, industrial structure doesn't explain *all* the difference in average revenues. There are industries in the

⁴ Big business data is for the number of enterprises in 1997 with revenues greater than \$5 million.

⁵ The number of small businesses is for 1995 taken from the small business profile data.

⁶ Government Services Industries are not covered in this article since data is not available at the provincial level. Average revenue for small businesses in Government Services in Canada was \$758,700 in 1995.

Table 2: Industrial Distribution for Small and Large Businesses

Industry	Percentage distribution		
	Big ⁴	Small ⁵	Difference
Agriculture, Fishing and Forestry	1.29%	4.04%	2.75%
Mining	1.71%	0.61%	-1.10%
Manufacturing	23.19%	4.85%	-18.35%
Construction	7.51%	14.39%	6.87%
Transportation	3.70%	6.96%	3.26%
Utilities including communication	1.08%	1.08%	0.01%
Wholesale Trade	20.99%	6.02%	-14.97%
Retail Trade	17.72%	15.83%	-1.89%
Finance and Insurance	4.41%	5.95%	1.54%
Real Estate and Insurance Agent	2.28%	7.88%	5.60%
Business Service	5.01%	12.94%	7.93%
Government, Education and Health Services	5.33%	3.05%	-2.28%
Accommodation and Food	1.87%	5.58%	3.70%
Other Services	3.91%	10.84%	6.93%
All Industries	100.00	100.00	0.00

smaller provinces with revenues well over the Canadian average. For example, revenue in Educational Services in Newfoundland was four times the national average for that industry. Six provinces had revenues two to three times the Canadian average in the Fishing and Trapping industry. In this case, the average is driven by British Columbia and Nova Scotia, where revenues were lower, and which between them are home to around 90 percent of all small Fishing and Trapping businesses in Canada.

Nevertheless, the dominant pattern is that revenue in a given industry is level across provinces. In fact, looking at industries individually, provincial/territorial revenue is rarely more than 50 percent above or below the Canadian industry average. In the most "populous" industries - retail, construction and business services, which together account for 43 percent of all small businesses - the divergence from industry averages is even smaller. The similarity of average revenue between provinces may point to the existence of effective competition for market share among small businesses.

Chart 1. Average Revenue by Province, \$000, 1995

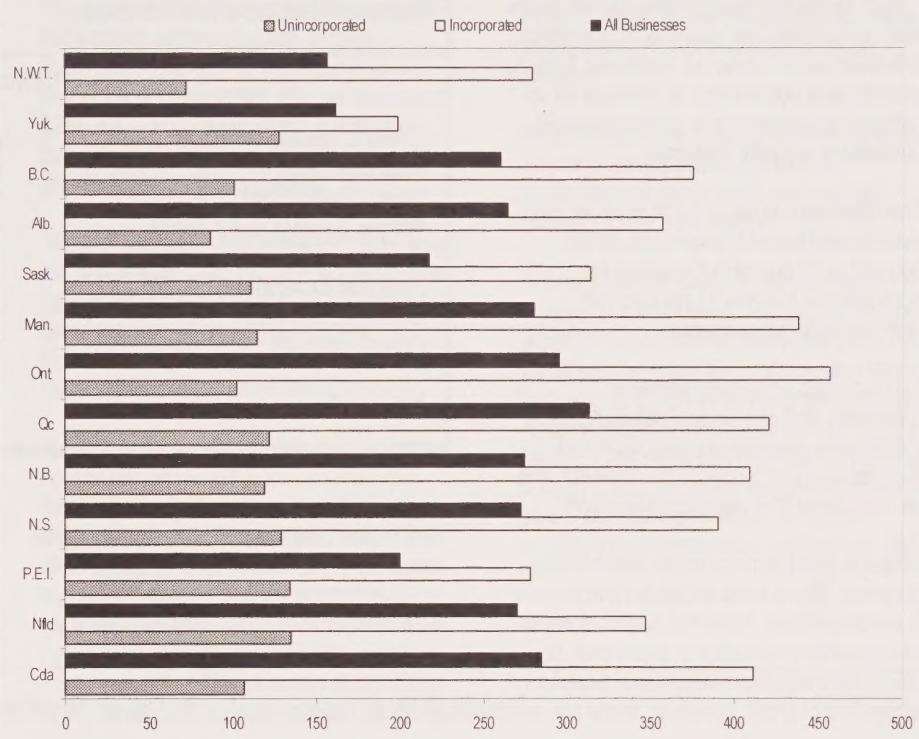
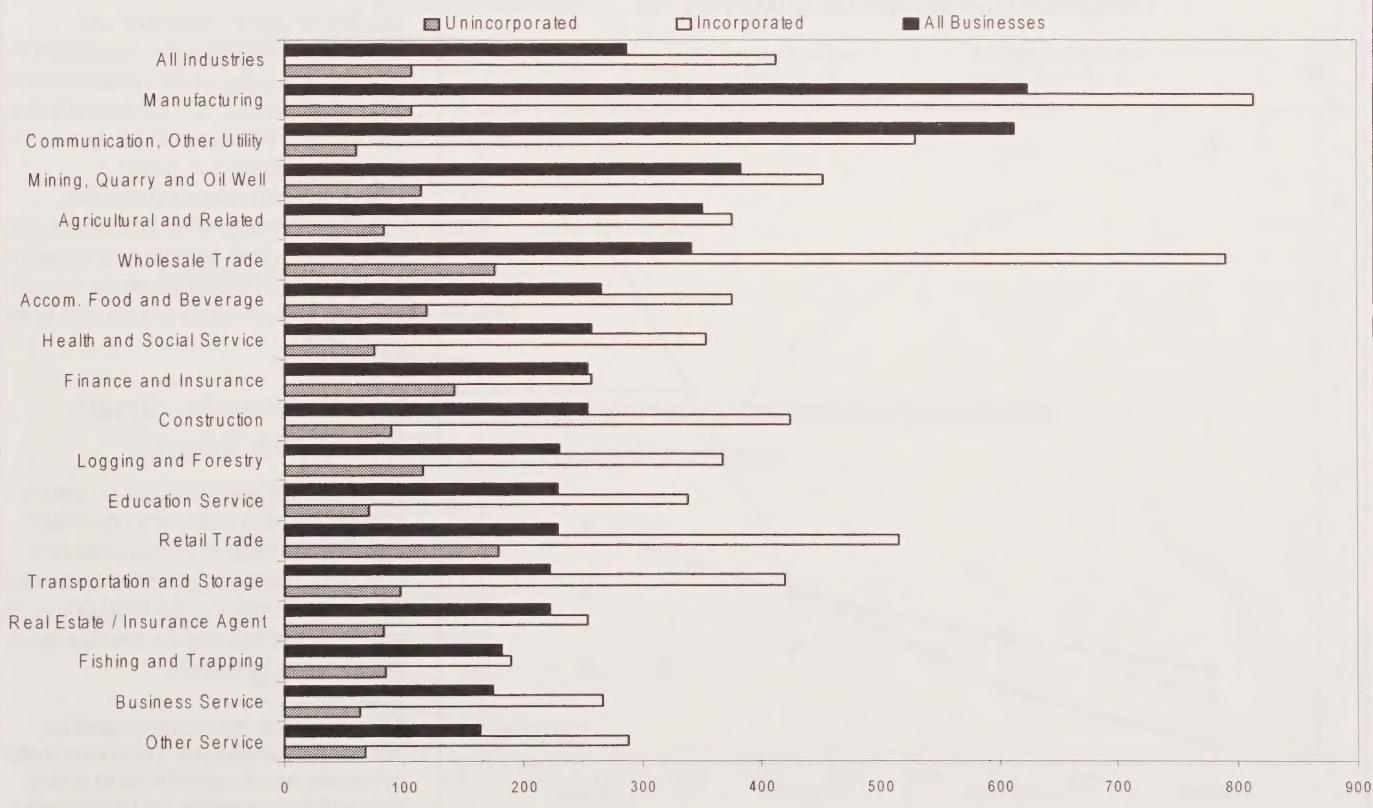


Chart 2. Average Revenue by Industry, \$000, 1995



Profit

Corporations averaged higher dollar profits than unincorporated businesses, consistent with their higher revenue. However, looking at profit as a percentage of revenue as an indicator of performance, unincorporated businesses actually did better.

The difference is largely based on wages, salaries and benefits expenses, which amount to 25 percent of revenue for corporations but only 11 percent for unincorporated businesses.

Corporations are legally separate "persons", and can deduct salaries paid to the owners. Owners of unincorporated business cannot "employ" themselves, and so must draw their earnings from profit.

Average profit is much more variable than revenue. This is to be expected since profit is a residual item: a change, which is small as a proportion of sales or expenses, is much more significant when expressed as a proportion of profit. However, there are

Table 3: Revenue and Expenses by Business Type, Canada, 1995, as a % of revenue

	Unincorporated	Incorporated
Gross Operating Revenue	100.0	100.0
Total Expenses	84.4	94.6
Cost of Goods Sold	35.9	34.5
Wages, Salaries and Benefits	10.7	25.4
Occupancy Expenses	13.6	11.2
Financial Expenses	3.1	5.5
General Expenses	5.5	3.5
Other Expenses	15.6	14.5
Net Profit	15.6	5.4

notable differences in average profit from one region to another. The variability holds true within industries. For example, in the retail industries, provincial revenue varies by plus or minus a quarter of the national average, while net results vary from plus two times to minus five times the average profit for Canada overall. Retailers'

revenue is higher and profits lower in Atlantic Canada compared with the national average. It would be interesting to look more closely at territorial differences in terms of the mix of industries and factor costs to better understand the differences in profitability but the length of this article does not permit it.

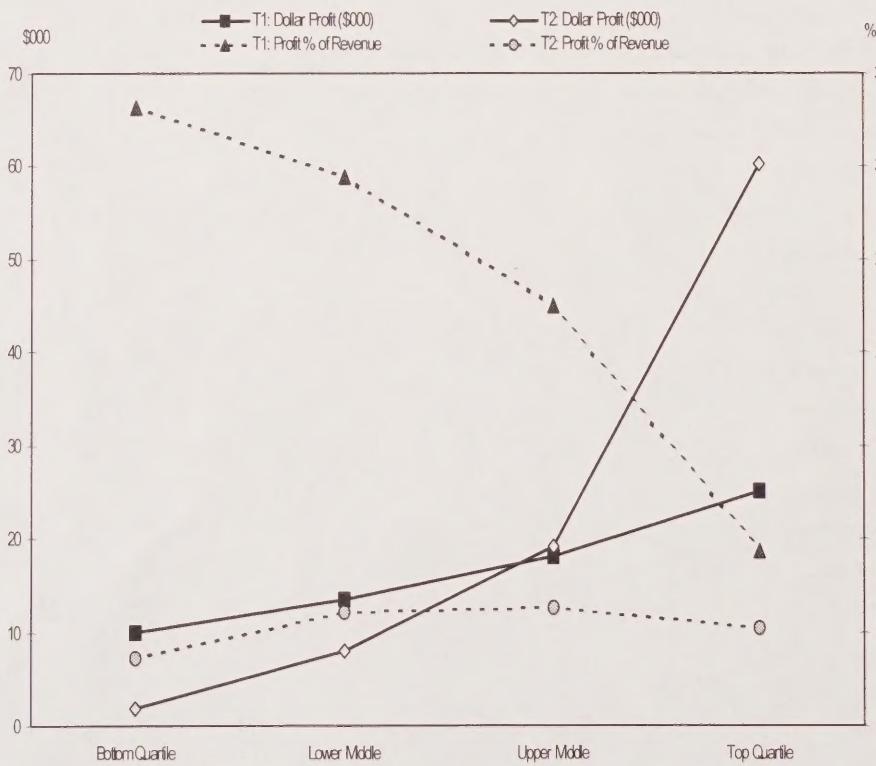
Although total profit increases with the size of business, it declines as a percentage of revenue. **Chart 3** plots profit for revenue quartiles for both incorporated and unincorporated businesses. It illustrates that in both cases dollar profits increase with the amount of revenue, from the bottom to the second, third and top quartiles. As a percentage of revenue, profit for unincorporated businesses declines steadily. For incorporated businesses, there is an increase from the bottom to the second quartile, a slight increase from the second to the third, and a decline from the third to the top quartile.

Investment in Small Business

How much money is required to operate a small corporation in different industries? The average value of assets gives one indication. The majority of small corporations (60 percent) deploy under \$300,000 in total assets. **Chart 4** shows the average value of total assets by industry.

⁷ The analysis in this section is based on incorporated business only. Since unincorporated businesses are not required to file a balance sheet with their tax returns, the information is not consistently available for them.

Chart 3: Dollar Profit and Profit as a % of Revenue, Unincorporated (T1) and Incorporated (T2) Businesses, 1995



The assets of small corporations are funded either by borrowing or by equity investment. The level of investment contributed by business owners - that is, total equity - is also shown on **Chart 4**. Total equity represents the net worth of owners in the business. In 1995, average equity ranged from \$36,000 for businesses in the Food and Accommodation Industries to much higher levels, for example \$336,000 in Agriculture and \$762,000 in Mining, Quarrying and Oil Wells.

There are modest variations from province to province: the lowest average asset value (taking all industries together) is in Newfoundland, at 64 percent of the Canadian average, and the highest in Prince Edward Island and Yukon Territory with 118 percent and 122 percent of the Canadian average.

Conclusions

There is considerable variety among small businesses across Canada. In most provinces, revenue for businesses in all industries is close to the national average of \$285,000. Broadly speaking, the smaller businesses are found in the smaller provincial/territorial economies.

There are much bigger differences between industries than between regions. Revenue ranges from a low of \$164,000 in Other Services Industries, to \$623,600 in Manufacturing, a sector which tends to be dominated by large enterprises.

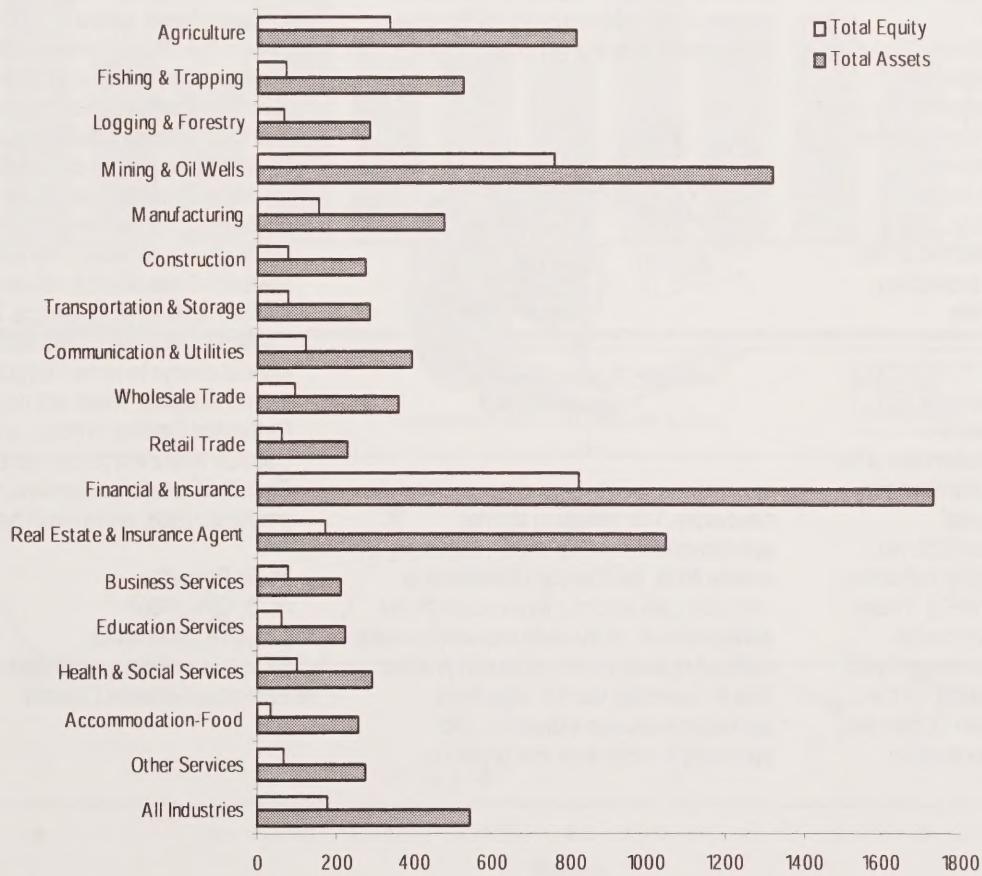
Corporations averaged higher total profits, consistent with their higher revenue, but looking at profit as a percentage of revenue unincorporated businesses did better. The different treatment of wages, salaries and benefits expenses for the two business types explains much of the divergence.

The fact that industry revenue is level across the provinces may point to the existence of effective competition for market share among small business in each industry.

Profit is much more variable than revenue. This is to be expected, but further exploration of geographic and industry variances could be fruitful.

Average investment in small businesses is modest in some cases. Total equity (the net worth of the business) averaged \$179,000 for all incorporated businesses, and ranged between \$36,000 for those in the Food and Accommodation Industries, and \$762,000 in Mining, Quarrying and Oil Wells. Investment is likely lower for unincorporated business, since, comparing revenue, these are smaller than incorporated businesses. ■

Chart 4. Assets and Equity by Industry, Incorporated Small Businesses



RESPONDENTS...

Statistics Canada surveys all types of businesses: large and small, incorporated and unincorporated, publicly and privately owned, with and without employees.

Businesses all across the country and in every type of industry respond to Statistics Canada surveys. All this activity results in hundreds of tables, graphs and statistical analysis that give an accurate picture of the Canadian economy. The information is also used to create profiles of provincial and territorial economic activity, as well as industry and commodity-specific reviews.

The Value of Good Information

Accurate, detailed, comprehensive and timely data is a significant benefit to all Canadians. **Decision-makers** in businesses, industry associations, governments, social and community groups, and individuals all use Statistics Canada data. **Governments** rely heavily on provincial statistics to develop federal-provincial transfer payment formulas, and to create and manage policies related to inter-provincial trade and regional development.

Provincial governments are able to use detailed data to better understand and forecast their economic performance and to improve growth prospects through informed management decisions. Governments, **industry groups and businesses** monitor Statistics Canada data to understand and measure economic cycles, consumer demand, industrial production, competitiveness and productivity.

Businesses need good data for financial, investment and marketing decisions. For example, if a computer hardware manufacturer wants to get a better idea of its share of the market, the manufacturer can turn to Statistics Canada's *Capital Expenditures by Type of Asset* (Cat. No. 61-223 XPE) and *Manufacturing Industries of Canada* (Cat. No. 31-203 XPE). These publications give information on capital expenditures on computer hardware by 45 different industries. The manufacturer can estimate the total size of the market, calculate its share and then sets its objectives for increasing that share.

Businesses can also use Statistics Canada data to help them spot new business opportunities. For example, when a major manufacturer of floor coverings begins planning its production levels for next year, the manufacturer can turn to Statistics Canada's *Department Store Sales and Stocks* (Cat. No. 63-002-XPB) and *Retail Trade* (Cat. No. 63-005-XPB). These publications help the manufacturer investigate the level of retail sales for floor coverings as well as the inventory still on the shelves. Sales trends over the past years can be used to forecast future trends, and set production levels.

Reducing the Paperwork

Collecting and producing information isn't a simple task. Businesses often find that filling out questionnaires can be a lengthy chore. Statistics Canada is working hard to ease this task by simplifying questionnaires, surveying fewer respondents, merging surveys to reduce their size and avoid overlap. Statistics Canada uses administrative data, such as provincial records and Revenue Canada tax returns, whenever possible. Statistics Canada is moving toward relying more on tax data, supplemented by surveys only where



necessary. This results in shorter questionnaires in some cases, especially for smaller firms. But there are limitations to administrative records; the records do not always contain all the data required to make complete industry and commodity profiles. This is especially true for large firms operating in diverse industries, and operating in more than one province.

The Statistics Act Protects Your Information

The *Statistics Act* contains very strong confidentiality provisions. Statistics Canada is prohibited by law from publishing any statistics or analysis that would identify any business or individual. Statistics Canada does not share any individual responses with Revenue Canada. As well, the confidentiality provisions of the *Statistics Act* are not affected by the *Access to Information Act*.

How to Find Data...

The *Statistics*

Act gives

Statistics
Canada the
responsibility
for making
survey results
widely
available to the
public. We

release information in anonymous tables, graphs and written analysis. This information is available through various means. Every day, Statistics Canada issues a press release, called *The Daily*, which delivers the official highlights of statistical results as they become available. It presents analysis of newly released data, with information on how to obtain more detailed analysis and data. It also includes weekly and monthly schedules of upcoming major releases and announces new products and services. *The Daily* and other Statistics Canada products are available on the Internet at www.statcan.ca. Statistics Canada's publications are also distributed without charge to some 700 public libraries across Canada. There are nine Regional Reference Centres in major cities across Canada where the public can consult Statistics Canada publications, electronic products, maps, and microfiches.

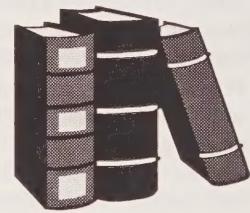
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Respondent Relations Program

Enterprise Statistics Division



SHORT TERM EXPECTATIONS SURVEY

by Jenny Grenier

The *Short Term Expectations Survey* is a monthly survey conducted with a group of economic analysts from across the provinces to get a representative view of the Canadian economy.

The analysts forecast the year-over-year changes in the consumer price index (CPI), the unemployment and participation rates of the labour force, the level of merchandise exports and imports, and the monthly change in gross domestic product (GDP). They provide key economic indicators for the following three months.

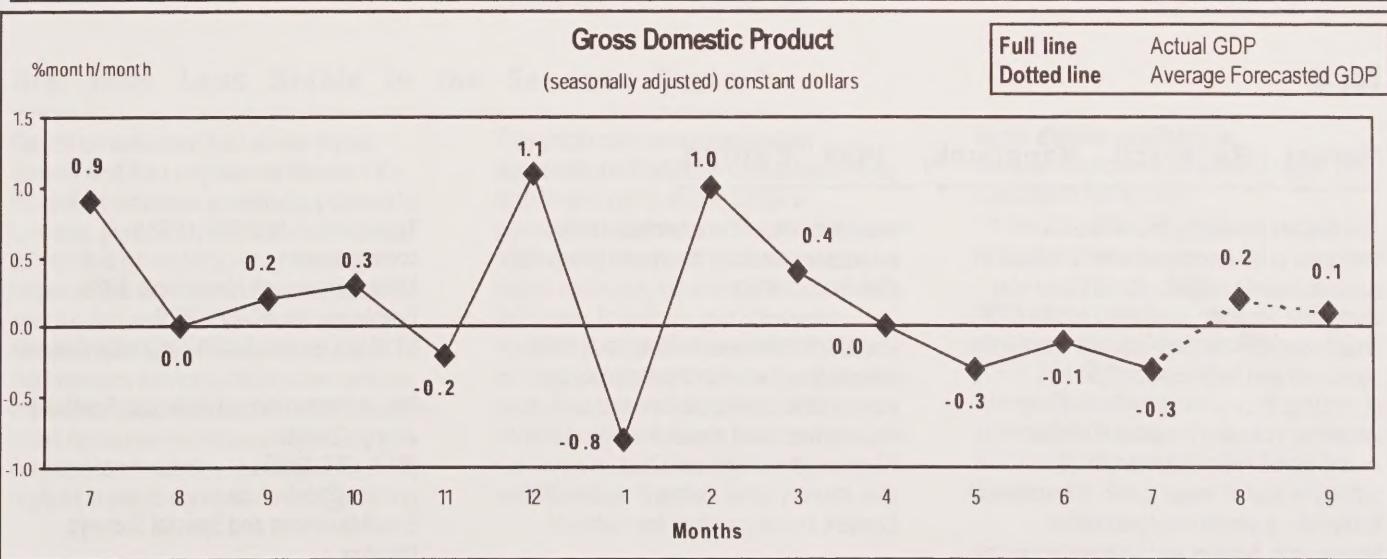
Questionnaires are prepared and faxed on a monthly basis to each of the analysts across the country. They have approximately one week to return their forecasts. Answers are then compiled and compared to actual data. An analysis is produced from the results and published in *The Daily* the following week.

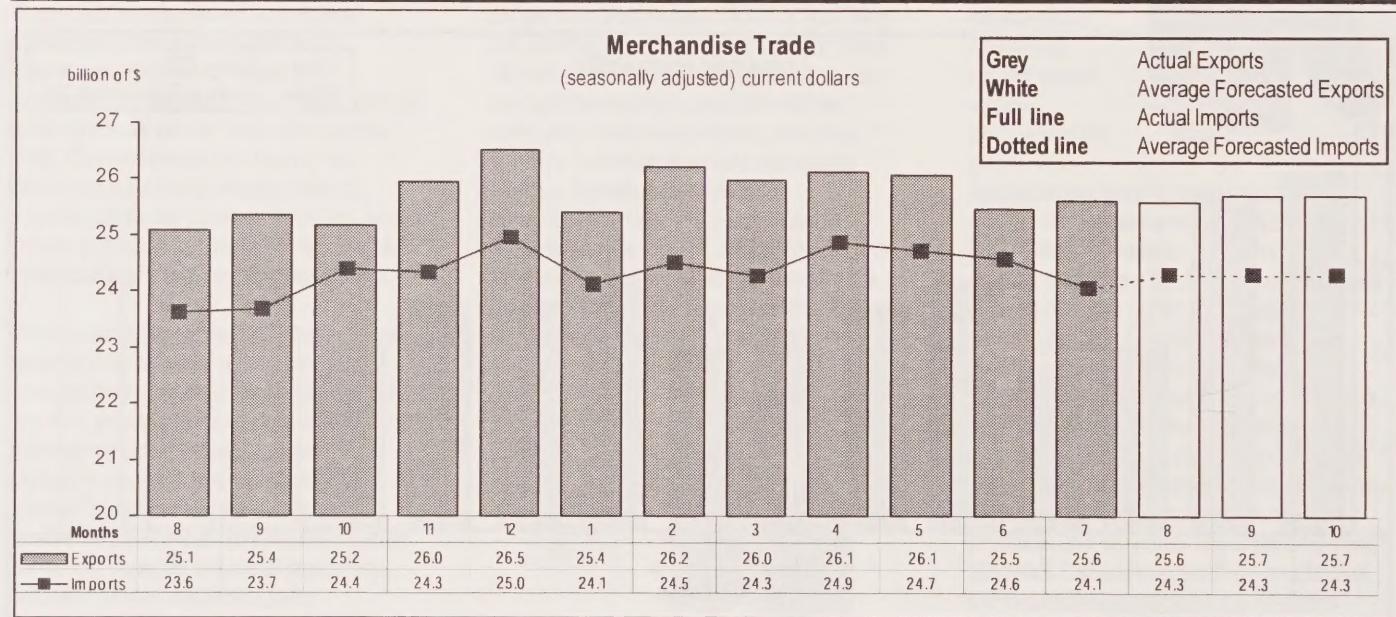
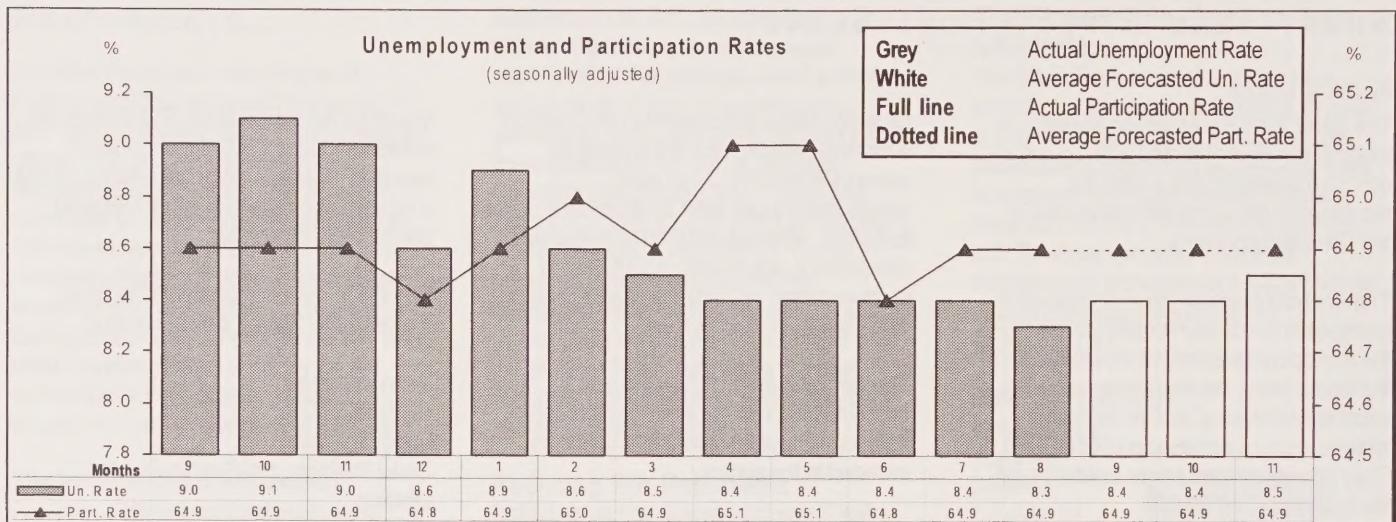
The following graphs show the actual historical data with the average forecasted data for the four key economic indicators included in the survey.

Watch for the results of the STES which are published during the first week of each month in *The Daily*. Visit our web site to see a new issue of *The Daily* every working day at: www.statcan.ca

For any information on the *Short Term Expectations Survey*, please contact:

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 Small Business and Special Surveys
 Division





NEW

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The *Market Research Handbook* is designed to be a comprehensive source of socio-economic statistics for all those who study the Canadian consumer market. The broad range of data are equally relevant to consumer and business-to-business marketing; they present profiles of key industries including the small business sector, as well as consumers in all provinces and 45 major cities. International trade data, projections of population, households, families and selected economic

indicators, etc. – this information helps businesses seeking to expand or develop new product lines.

The *Market Research Handbook 1998* reveals the Canadian marketplace in a way no other statistical resource can. It delivers first hand results from more than 20 specialized Statistics Canada surveys, plus the very latest details from the 1996 Census, in one practical sourcebook!

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Small Business and Special Surveys
Division

New Data from GST Administrative Records, 1992 to 1997

In July 1998 Statistics Canada released data for the first time on the average fair market value (purchase price) of new homes in Canada and average rebates of the goods and services tax paid on these homes.

Since the GST was implemented in 1991, individuals who purchase or build new homes, or who substantially renovate existing ones, have been entitled to a partial rebate of the GST paid on the home. To receive this rebate, homebuyers must complete and submit Revenue Canada's form GST-190, recording the fair market value, or purchase price, and other basic information about the transaction. Alternatively, the homebuilder can deduct the rebate from the purchase price and submit the form on the purchaser's behalf.

This new series contains previously undocumented rebates and new housing statistics on the basis of province or territory, census metropolitan area or census agglomeration, and component census subdivisions. Data are also available by type, that is, whether the owner or a builder constructed the home, or whether it was co-operative housing.

Eligibility criteria to receive a rebate include: a purchase price of \$450,000 or below and the home must have been built or purchased for personal use. There were also several other criteria.

General trends and characteristics of the administrative data file are analyzed in the publication *Average fair market value/purchase price for new homes in Canada - New data from GST administrative records* (64-507-XIE, \$35). The full set of average fair market value and rebate tables is available on CANSIM: matrix 9998.

For more information on this release, contact:

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Tax Data Division

"Can I Help You?"; The Rise in Household Spending on Services

Consumer expenditures by households are increasingly a driving force behind economic growth, and are affected by several factors. Consumer tastes can shift over time, as new commodities are introduced and others become outdated. Changes in the demographic, economic and social characteristics of consumers can also affect consumer preferences, as can shifts in the relative prices, utilities and quality levels of various goods and services.

Based on Family Expenditure Survey data for both 1986 and 1996, this study examines how the household consumption of services has shifted over the past decade. Particular attention is paid to spending on: communications services; finance, insurance, and real estate services; food and beverage services; traveler accommodation services; amusement and recreation services; and personal and household services. Insights are also provided on why household spending patterns for specific service commodities have changed from 1986 to 1996.

More details available in:
Services Indicators, Second Quarter 1998 Catalogue No. 63-016
To order: 1-800-700-1033
order@statcan.ca

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Services Division

Are Jobs Less Stable in the Services Sector?

Based on data from the Labour Force Survey and the Longitudinal Worker File, this article examines job stability patterns in Canada, particularly in the services sector. It finds that job stability varies not only between the services and non-services sectors, but also within the services sector. For example, jobs are equally as stable in the business services, distributive services and manufacturing industries, but less stable in the consumer services and primary and construction industries. Job stability is highest in public services.

This article also demonstrates that aggregate job stability is now at historically high levels, partly due to drops in permanent layoff rates and quit rates. Since a rising quit rate usually accompanies a robust economy, the increase in job stability that arises from lower quit rates is not necessarily a positive development. Lower quit rates are found in the business services and public services industries. This contrasts with consumer services where the rise in job stability was caused by a drop in permanent layoff rates.

More details available in:
Services Indicators, Second Quarter 1998 Catalogue No. 63-016
To order: 1-800-700-1033
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Agriculture Division

Working with agriculture data is now much easier. Whether your interest in agribusiness is as an analyst, researcher or producer, the 1996 *Census of Agriculture* CD-ROM brings you the data you need at the click of a mouse. With its wealth of information, release 1 of the 1996 *Census of Agriculture* CD-ROM is easy to use. Data tables present all farm and selected farm operator characteristics from the 1996 *Census of Agriculture* at the national and provincial levels, as well as for over 2,300 small areas across Canada. It is all there; number and area of farms, crop areas,

livestock and poultry inventories, land use and land management practices, machinery and equipment inventories, and a variety of financial variables. Also included is information on the men and women who manage the nation's farms including their age, sex, residence status and work activities. For further information contact, Census of Agriculture User Services toll-free at 1-800-465-1991.

Agriculture has been working to improve on the information contributing to a better understanding of the changes to the Canadian food supply and diet over time. The publication, *Food Consumption in*

Canada, contains comprehensive coverage on the consumption patterns of our foods and beverages; data on our food supply from farm production, processing and imports; information on how much food is exported, used by processors and held in storage; fifteen years of data at your fingertips; analysis and graphs illustrating trends and changes in eating patterns. To learn more about *Food Consumption in Canada*, call the Agriculture Division of Statistics Canada toll-free at 1-800-465-1991.

Rural and Small Town Canada Analysis Bulletin

Statistics Canada is launching an occasional bulletin series to document the structure and trends in rural Canada. The objective is to provide baseline information for national and provincial discussions of rural issues and to provide a baseline with which local communities can compare their situation. The *Rural and Small Town Canada Analysis Bulletin* is produced by Agriculture Division and is available without charge. The following items are highlights of next issues.

Rural and Small Town Population is Growing in the 1990s

Highlights

- Overall, Canada's rural and small town population has grown in each intercensal period since 1976.
- Rural and small town growth rates vary widely among the provinces.
- Much of the growth within rural and small town areas is in the small towns.
- Sub-provincial data show wide regional differences within each province.
- However, population growth has been higher in "larger urban centres".
- Thus, the share of Canada's population living in rural and small town areas has declined from 34% in 1976 to 22% in 1996.
- Newfoundland is the only province with over 50% of its population living in rural and small town areas.

More details available in:

Rural and Small Town Canada Analysis Bulletin, Vol. 1, No. 1
Catalogue No. 21-006-XPB
To order: 1-800-465-1991

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Employment Patterns in the Non-Metro Workforce

Highlights

- Patterns of employment growth and decline in the non-metro workforce differed from those in the metro workforce.
- The growth and decline of non-metro employment varied according to provincial economic activities.
- For all provinces, except the Prairies provinces, non-metro unemployment rates were generally higher than metro unemployment rates.
- Non-metro unemployment rates were less sensitive to economic fluctuations. In a recession, the rise in the unemployment rate was slower in non-metro areas. In economic expansions, the fall in the non-metro unemployment rate was slower.
- Employment rates (employment / population ratios) were lower in non-metro labour markets.
- Employment rates were higher in Western Canada.

More details available in:

Rural and Small Town Canada Analysis Bulletin, Vol. 1, No. 2
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INSIGHTS ON...

Statistics Canada's newsletter on trends in business and trade statistics

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Note of Appreciation

Canada owes the success of its statistical system to a long-standing co-operation involving Statistics Canada, the citizens of Canada, its businesses, governments and other institutions. Accurate and timely statistical information could not be produced without their continued co-operation and goodwill.

From the Editor's desk...

Insights On... is back!

Please note that this is the first issue of *Insights On...* since the Fall 1997 edition.

Insights On... was away for a little while due to reorganization, but it is now back. We will be publishing great articles approximately every three months. We hope that *Insights On...* will keep your interest.

The next issue of *Insights On...* will be published in January 1999.

J. Grenier
Publication Officer
Small Business and Special Surveys Division, Statistics Canada

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